



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Filing of the 11th Accounting

Age: 63	CHRIS WADE, brother, was appointed as Conservator of the Person in 1991 and RAYMOND LOVE, private professional fiduciary, was appointed Conservator of the Estate in 1991 (Mr. Wade had been subject to an LPS Conservatorship since 1981, prior to these appointments in 1991.)	NEEDS/PROBLEMS/COMMENTS:
Cont. from 050812, 061212, 111612		
Aff.Sub.Wit.	RAYMOND LOVE resigned and CHRIS WADE, brother and Conservator of the Person, was appointed as Successor Conservator of the ESTATE on 09/19/11 with deposits in a blocked account of \$101,674.67 and Bond set at \$70,000.00. Letters of Conservatorship of the Estate were issued to CHRIS WADE on 11/08/11.	CONTINUED FROM 11/16/12 Minute Order from 11/1612 states: Ms. Ratzlaff informs the Court that there were some errors in the accounting and she misplaced the fee schedule so she is waiting on her client to provide another one.
Verified		
Inventory		As of 12/14/12, no additional documents have been filed. 1. Need 11 th and Final Accounting and Report of Former Conservator.
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.	Minute Order from 05/18/11 hearing on the Tenth Account set this matter for status of the 11th and Final Accounting of former Conservator of the Estate on 05/08/12.	
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp	Status Report on Behalf of Successor Conservator, Chris Wade filed 05/03/12 states: the former conservator, Raymond Love, is in the process of preparing his Eleventh and Final Account. The conservatorship estate contained two accounts at Premier Valley Bank, a checking account and a CD. The CD is a blocked account. The checking account has been transferred to Chris Wade as the successor conservator, but the blocked account remains in the name of Raymond Love, the former conservator pending the approval of Mr. Love's Eleventh and Final Account.	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 12/14/12
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 1A - Wade

Status Hearing Re: Filing of the First Account by Successor Conservator; Receipt of Blocked Account

Age: 63		<p>CHRIS WADE, brother, was appointed as Conservator of the Person in 1991 and RAYMOND LOVE, private professional fiduciary, was appointed Conservator of the Estate in 1991 (Mr. Wade had been subject to an LPS Conservatorship since 1981, prior to these appointments in 1991.)</p> <p>RAYMOND LOVE resigned and CHRIS WADE, brother and Conservator of the Person, was appointed as Successor Conservator of the ESTATE on 09/19/11 with deposits in a blocked account of \$101,674.67 and Bond set at \$70,000.00. Letters of Conservatorship of the Estate were issued to CHRIS WADE on 11/08/11.</p> <p>Minute Order from 06/12/12 hearing set this matter for status re Filing of the First Account by Successor Conservator and Receipt of Blocked Account on 11/16/12. Minute Order from 11/16/12 continued the matter to 01/04/12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 11/16/12</u></p> <p>As of 12/14/12, the 11th and Final Accounting of Raymond Love, former Conservator of the Estate has not been filed (See Page 1A).</p> <p>1. Need Receipt for Blocked Account, Inventory & Appraisal, and First Accounting of Successor Conservator <u>and/or</u> Status Update.</p> <p>Note: No receipt and acknowledgment of funds placed in a blocked account has been filed by the successor conservator. Minute order from 09/19/11 states: Gary Bagdasarian asks that the successor conservator be appointed in order to obtain the blocked account. The Court approves the Petition, subject to receipt.</p> <p>The successor conservator filed a bond in the amount of \$70,000.00 and Letters were issued, but no receipt for deposit into blocked account has been filed. The Order appointing successor conservator is marked at item 20(b) stating bond of \$70,000.00 is required, and also marked at 20(c) stating deposits are ordered to be placed in a blocked account; however, no dollar amount or institution is specified.</p>
Cont. from 111612			
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Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: JF			
Reviewed on: 12/14/12			
Updates:			
Recommendation:			
File 1B - Wade			

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
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	Aff.Sub.Wit.	
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	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
		<p>OFF CALENDAR. Second and Final Account was filed on 11/30/12 and is set for hearing on 1/16/13.</p>
		Reviewed by: KT
		Reviewed on: 12/12/12
		Updates:
		Recommendation:
		File 2 - Hudiburgh

Petition of Elaine Cory for Settlement of Accounting and Report of Bruce Bickel
Dated and Served August 21, 2009 and Objections Thereto, and for Order
Compelling Former Trustee James Wagner to Account for Period from April 1, 2007
Through January 31, 2008

Louie Friguglietti DOD: 5-11-06		ELAINE CORY, Beneficiary of the LOUIE FRIGUGLIETTI TRUST dated 9-30-05 and amended 10-4-05 and 10-11-05, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 11-29-12:</u> Mr. Curry is appearing by conf. call. Counsel requests a continuance. Matter set for Status Conference on 1-4-13. Counsel is directed to provide notice of the Status Conference to all counsel. <u>As of 12-12-12, nothing further has been filed. The following issues remain:</u> 1. Need clarification: Petitioner requests that the Court review and settle an informal accounting that was provided by the trustee to Petitioner informally by fax in 2009. The Court may require authority for such request. Examiner notes that the document attached is not the accounting format required by Probate Code §1060 (containing summary, etc.), and is not a verified document or petition by the trustee for approval. 2. Need Notice of Hearing. 3. Need proof of service of Notice of Hearing at least 30 days prior to the hearing pursuant to Probate Code §17203 on: - Colleen Toscano - Bruce Bickel (Trustee) - James Wagner (Former Trustee) 4. Need proof of service of Notice of Hearing at least 30 days prior to the hearing on the trustee's bond due to the request for removal and surcharge of the trustee.
Cont. from 110112, 112912			
<input type="checkbox"/>	Aff.Sub.Wit.	<p>Petitioner states the decedent's attorney James F. Wagner was the original trustee and Bruce Bickel is acting as trustee currently. The former trustee provided his "First Account and Report" for the period <u>9-30-05 through 3-31-07</u>. He subsequently resigned as trustee and this Court appointed Bruce Bickel as the successor trustee.</p> <p>Bruce Bickel assumed the office of trustee after his appointment by the Court once the bond was issued on or about 2-8-08, and <u>provided an informal report and accounting by memorandum on 8-21-09, which covered the period from 2-1-08 to 8-15-09 (attached).</u></p> <p>James Wagner did not provide an accounting from <u>4-1-07 through 1-31-08</u>.</p> <p>In order to determine what receipts and expenditures during that time period were related to the specific gift to Petitioner in accordance with this Court's previous order construing the terms of the trust, it is necessary that an itemized accounting with receipts and disbursements identified and described be provided to the Court, to the current trustee, and to the beneficiaries by James Wagner.</p> <p>Petitioner requests the Court review and settle the informal report and accounting by Bruce Bickel (Exhibit A) and review the acts of the trustee.</p> <p>Petitioner also objects to the following portions of the accounting and requests the Court order the trustee to provide more detailed information as set forth herein or correct his accounting as between the beneficiaries of the trust, and for other remedies prayed for hereinafter.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	
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Reviewed by: skc			
Reviewed on: 12-12-12			
Updates:			
Recommendation:			
File 3A - Friguglietti			

Petitioner specifically objects to the following items in Bruce Bickel's accounting:

- \$1,000.00 for riding lawnmower on 4-3-08 – Petitioner states the property that it was purchased for is a regular city lot with a front yard of approx. 10x30 with no lawn in the back yard, having all fruit trees and grapevines in the back. In addition, \$275.00 paid to Bernie Mesa on 4-23-09 to disc the weeds, \$1,035.00 paid to City of Los Banos for weed abatement, and \$274.00 for weedeater on 8-12-09. Petitioner states the caretaker received payments of approx. \$7,102.60, but did not provide mowing or weeding services. Petitioner is informed and believes there was an operating Ford tractor and disc on the property that were trust assets and should have been used for this maintenance.
- Expenditures of \$800.00 paid to American Express by check #1035 on 7-30-08 are not explained in this report, and absent adequate explanation, should not be approved and the trustee should not be credited with that expenditure.
- Disbursements totaling \$610.11 for telephone bills at a vacant building are objected to as shown on Page 3 of the category detail report.
- Utility expenditures paid to PG&E shown on pages 3 and 4 of the category detail report ranging from \$342-\$572 per month for a vacant building are objected to as unreasonably high and beyond the possible need for keeping utility service in place.
- Expenditures to City of Los Banos for water bills ranging from \$69.05 to \$425.55 are objected to as unreasonably high and not related to trust business for a vacant building when the minimum water and garbage was only \$58.11 at the time.
- Expenditures for bond premium as being unnecessarily high because the bond was retained in an amount higher than was required by the Court, which reduced the bond amount to \$2.9 million on 4-18-08. The premium of \$10,500.00 paid 3-30-08 and again on 2-11-09 reflects that the bond amount must not have been reduced pursuant to the Court's order, and the trustee should be surcharged for payments for the excessive bond.
- \$2,279.00 paid to Allied Insurance on 8-26-08 as unreasonably high, as only general liability insurance was needed by the trust on the 28 acres on Overland Road as there are no structures on the Overland Road property and premium should only have been about \$600.00 for general liability, of which only half should have been paid by the trust as co-tenant. Further, the farm tenant should have the trust listed as an additional insured on his own farm general liability policy, which should have reduced or eliminated the need for this expenditure.
- Petitioner objects to the 7-31-08 property tax bill for farm equipment because the farm equipment was no longer in existence and had been sold prior to this time, and according to the caretaker, Petitioner is informed and believes that the only farm equipment remaining at the time was one small Ford tractor (1950 model) and a disc.
- Petitioner objects to payment of property taxes for parcel 082-050-066 which are strictly for the 10 acres with structures on which beneficiary has no interest in.
- \$12,835.42 for APN 081-110-007 because this payment is for 100% interest in the whole 28 acres and only ½ of the property taxes should have been paid by the trustee out of trust assets, as the other ½ was owned by Colleen Toscano as an individual.

SEE ADDITIONAL PAGES

Page 3

- Petitioner objects to the Trustee's fees and requests that the Court order that the trustee inform the Court how these fees were calculated and provide an itemized statement of time spent and description of task by the trustee rather than the non-descriptive line item shown at pages 5 and 6 of the category detail report.
- It appears to Petitioner from the memorandum that the trustee had not viewed the property at the time of preparation of the accounting and did not know what items belonged to the trust at that time.
- Petitioner objects that the report shows no option payment receipts. If no option payments or extension payments were made when due, then the trustee breached his duty to use reasonable care in management by failing to list the Overland property for sale, thereby unnecessarily permitting the property specifically devised to Petitioner to depreciate during a declining real estate market.
- Petitioner objects that the report does not show that the trustee filed any fiduciary income tax return from May 07-08, 08-09, or any other accounting period if the tax filing period was changed by the trustee.
- Petitioner alleges that the trustee has breached his duty to use reasonable care, skill and caution in protection and management of the trust estate by the foregoing expenditures and actions, and that he has breached his duty of impartiality between trust beneficiaries by charging expenditures to the trust which are for the benefit of Colleen Toscano as an individual co-tenant and by charging expenditures which are solely to benefit trust assets which would pass to Colleen Toscano as part of the residue and charging them against Petitioner's share, who is a specific devisee of the Overland Road property.
- Petitioner alleges that the trustee has breached his duty to act with impartiality between the beneficiaries by actively participating in the litigation of Petitioner's petition to construe the trust on the side of Colleen Toscano, which was solely for the benefit of Colleen Toscano, because regardless of how the Court ruled in the hearing on that petition, the result would have had absolutely no effect on the overall trust corpus and estate, and therefore, his active engagement was solely on behalf of and for the benefit of beneficiary Colleen Toscano and was hostile to and against the interest of Petitioner as beneficiary.

Petitioner prays for an order that:

1. The trustee be required to supplement and explain his informal report and accounting in the particulars set forth herein above;
2. The Court disallow the credits which the trustee claims to be entitled to regarding the disbursements and expenditures objected to herein and that the trustee's fees be surcharged therefor;
3. The trustee file with the Court the itemized statement of time spent with specific description of services rendered for the trustee's fees as shown on the accounting provided to Petitioner, and that the Court disallow all or any portion of said fees that are not shown to be reasonable and for the benefit of the entire trust estate, and that no part of the fees be charged against Petitioner's share except those which are specifically and directly related to the Overland Road property which is the specific devise to Petitioner;
4. The trustee be ordered to reduce the bond amount to comply with the Court's order of 4-19-08 if he has not already done so;
5. The trustee be removed for the reason of his breaches of trust as alleged herein above;
6. The former trustee James Wagner prepare and file an accounting for his actions as trustee from 4-1-07 through 1-31-08; and
7. For such other and further relief as the Court deems proper.

Status Conference

Louie Friguglietti DOD: 5-11-06		ELAINE CORY , Beneficiary, filed the Petition at Page 3A on 8-21-12. The petition was heard on 10-1-12, continued to 11-1-12, continued to 11-29-12, and is now set to be heard at Page 3A (1-4-13). Minute Order 11-29-12: Mr. Curry is appearing by conf. call. Counsel requests a continuance. Matter set for Status Conference on 1-4-13. Counsel is directed to provide notice of the Status Conference to all counsel. As of 12-12-12, nothing further has been filed.	NEEDS/PROBLEMS/COMMENTS:																																																																															
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Petition to Compel Turnover of the Betty Ruth Cozby Trust Pursuant to Probate Code Section 16061.5 and for Damages and Attorney's Fees Pursuant to Probate Code Section 16061.9

			JANICE POTTER is Petitioner.	NEEDS/PROBLEMS/ COMMENTS: Continued from 11/15/12. As of 12/12/12 the following issue remains: 1. Need Order.
			Petitioner states she is an heir at law, and believes she is a beneficiary of the Betty Ruth Cozby Trust.	
			Betty Ruth Cozby died in April 2011.	
			Betty Cozby was unmarried and did not have children, and her parents and siblings predeceased her.	
			Petitioner is a niece of Betty Cozby and heir at law under applicable Probate Code intestacy statutes.	
			Petitioner believes Betty Cozby's friend, Edward D. Reimer, is the named successor Trustee of the Betty Ruth Cozby Trust.	
			Upon the death of Ruth Cozby the Trust became irrevocable. Petitioner states she requested orally, and then more formally, through counsel, a copy of the Trust. The formal request was made on 8/17/2011. No response has been received to the request.	
			Probate Code §16061.5 provides that a trustee has a duty to provide a true and complete copy of the terms of an irrevocable trust, or irrevocable portion of a trust, to any beneficiary who requests it, and to any heir of a deceased settlor who requests it.	
			Wherefore, Petitioner seeks relief as follows:	
			1. For an Order compelling Edward D. Reimer to provide full and complete copies of the Betty Ruth Cozby trust, including any applicable schedules and amendments, if any;	
			2. For an Order compelling turnover of relevant information on the administration of assets of the Trust pursuant to Probate Code section 16061;	
			3. That Edward D. Reimer be ordered to personally pay Petitioner's attorney's fees and costs in filing and prosecuting this petition.	
			Statement of Assets Held in The Betty Cozby Living Trust filed by Edward D. Reimer and Ola May Langley on 6/4/12.	
Cont. from 022912, 040412, 060412, 081312, 100412, 111512				
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	Citation			
	FTB Notice			

Reviewed by: KT
Reviewed on: 12/12/12
Updates:
Recommendation:
File 4A - Cozby

Status Re: Accounting

		JANICE POTTER filed a Petition to Compel Turnover of the Betty Ruth Cozby Trust and for Damages and Attorney's Fees. The matter was heard on 4/4/12 and continued to 6/4/12.	NEEDS/PROBLEMS/COMMENTS: Continued from 11/15/12. Minute order states Mr. Campbell is appearing via conference call. Mr. Gilmore advises the Court that his client will be picking up the appraisal on the jewelry today. He further advises that he has the accounting ready to go but for the receipts and documentation on the expenses for which he is waiting on his client to provide. Mr. Gilmore indicates to the Court that he could have the accounting by mid-December. Matter continued to 1/4/13. Mr. Gilmore and Mr. Reimer are to be personally present on 1/4/13 if the accounting is not filed.
Cont. from 081312, 100412, 111512		At the hearing on 6/4/12 the court set a status hearing for the filing of the accounting.	
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			Reviewed by: KT Reviewed on: 12/12/12 Updates: Recommendation: File 4B – Cozby

Probate Status Hearing Re: Filing Inventory and Appraisal

		<p>PATRICIA GAZDA filed a Petition for Substituted Judgment in the Conservatorship of Jack N. Allen, case no. 11CEPR00980.</p> <p>On 9/17/12 the Order for Substituted Judgment was entered creating this Special Needs Trust.</p> <p>Inland County Regional Center was appointed as Trustee to act without bond.</p> <p>The Order for Substituted Judgment set this status hearing for the filing of the inventory and appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal or current written status report pursuant to Local Rule 7.5.</p>
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		<p>Reviewed by: KT</p> <p>Reviewed on: 12/12/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 - Allen</p>	

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution (Prob. C. 12200, et seq.)

DOD: 4/9/2001	<p>KENNETH J. BROWN was appointed as Executor with full IAEA authority and bond set at \$50,000.00 on 11/10/2009.</p> <p>Bond was filed on 12/18/2009.</p> <p>Letters issued on 12/31/09.</p> <p>Inventory and appraisal was filed on 1/11/11 showing the estate valued at \$55,000.00.</p> <p>Notice of Status Hearing was mailed to Attorney Thomas Boyajian and Executor Kenneth Brown on 10/31/12 for failure to file the first account or petition for final distribution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution or current written status report pursuant to Local Rule 7.5.</p>
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		<p>Reviewed by: KT</p> <p>Reviewed on: 12/12/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 - Brown</p>

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD:3/20/2010		<p>SANDRA DE MEO was appointed Administrator without bond and with Limited IAEA authority on 7/14/11.</p> <p>Letters issued on 7/14/11.</p> <p>I & A - \$79,000.00</p> <p>Order Confirming Sale of Real property was entered on 12/20/2011. The order set a bond at \$53,000.00</p> <p>Bond filed on 12/14/11.</p> <p>This status hearing was set by Minute Order dated 7/14/11.</p> <p>Status Report filed on 9/26/12 states the Administrator has recently completed the sale of the estate real property. A final account and report shall be prepared and submitted to the court within 90 days. The Administrator requests that the court authorize her to continue the administration of the estate for a period of six months so that the entire proceeding can be concluded.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 9/28/12. Minute order states no appearances. Matter continued to 1/4/13. Sandra De Meo is ordered to be personally present on 1/4/13. If the documents are filed by 1/4/13, no appearance will be necessary. Ms. DeMeo is authorized to appear by Court Call. A copy of the minute order was mailed to Sandra DeMeo on 10/5/12.</p> <p>1. A Request for Special Notice was filed by the Department of Health Services on 5/17/11. A copy of the Status Report was not served on the Department of Health Services as required.</p>
Cont. from 082312, 092812			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 12/12/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 - Graham</p>	

Probate Status Hearing Re: Filing of the First Account

Age: 93	RONALD J. BRYANT was appointed	NEEDS/PROBLEMS/COMMENTS: 1. Need first account or current status report.
	Conservator of the Person and Estate on 9-13-11.	
	I&A filed 1-17-12 indicates a final	
	conservatorship estate value of \$37,000.00	
Aff.Sub.Wit.	consisting of a one-quarter interest in	
Verified	residential real property in Santa Maria, CA,	
Inventory	and household furniture and furnishings.	
PTC		
Not.Cred.	The house was sold pursuant to Order	
Notice of Hrg	Confirming Sale of Real Property filed 9-25-12.	
Aff.Mail		
Aff.Pub.	On 11-13-12, a Receipt for Blocked Account	
Sp.Ntc.	was filed showing an initial deposit of	
Pers.Serv.	\$36,491.12 and a present balance of	
Conf. Screen	\$51,516.05.	
Letters	On 11-16-12, the Court set this status hearing	
Duties/Supp	for filing of the first account.	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 12-12-12
		Updates:
		Recommendation:
		File 8 - Bryant

Atty Burnside, Leigh W. (for Dale L. Mell – grandson/Petitioner)

Atty Krbecek, Randolph (for Dale G. Mell – son/competing Petitioner/Objector)

Status Hearing Re: Bond

DOD: 05/29/09	DALE L. MELL , grandson, filed a Petition for Probate seeking to be appointed as Administrator with Will Annexed on 03/08/12.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 11/16/12</u> Minute Order from 11/16/12 states: Mr. Krbecek informs the Court that the bond application is pending. Bond set at \$85,000.00. As of 12/14/12, nothing further has been filed. 1. Need bond in the amount of \$85,000.00 posted by Dale G. Mell.
Cont. from 111612	DALE G. MELL , son/named Executor, filed a competing Petition for Probate on 04/12/12.	
Aff.Sub.Wit.	Each party objected to the other's appointment as personal representative.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Minute Order from Settlement Conference Hearing on 05/29/12 , states: Parties reach a resolution as follows: Parties agree that Dale L. Mell and Dale G. Mell will act as co-personal representatives and bond will be waived for Dale G. Mell with a possible waiver as to Dale L. Mell which will be worked out among counsel. Additionally, Ms. Burnside and Mr. Krbecek agree to act as co-counsel. Upon inquiry by the Court, the parties individually agree to the terms of the settlement.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt	Order signed 06/25/12 states that bond is waived as to Dale G. Mell and Dale L. Mell shall post bond in the amount of \$158,600.00	
CI Report		
9202		
Order	Status hearings were subsequently held on 07/13/12, 08/10/12, 09/21/12, and 10/19/12 regarding the posting of bond by Dale L. Mell.	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation	Minute Order dated 10/19/12 states in pertinent part: Ms. Burnside informs the Court that Larry and Tina are not willing to waive bond and the issue of bond is not going well. The Court finds that Dale L. Mell is unable to be bonded. The Court appoints Dale G. Mell as executor with bond in the amount of \$85,000.00. Order to be submitted. Mr. Krbecek is directed to provide any bank records for the three accounts.	
FTB Notice	Order appointing Dale G. Mell as Executor with bond in the amount of \$85,000.00 was filed on 11/09/12.	

Reviewed by: JF

Reviewed on: 12/14/12

Updates:

Recommendation:

File 9 - Mell

Status Hearing Re: Filing of the Inventory and Appraisal

		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Inventory and Appraisal filed on 9/4/12.
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: KT
		Reviewed on: 12/13/12
		Updates:
		Recommendation:
		File 10 - Lee

Probate Status Hearing Re: Filing Inventory and Appraisal

Age: 19		KENNETH ROBERTS, grandfather, was appointed Conservator of the Estate without bond on 08/06/12 and Letters were issued on 08/17/12.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 100212, 112712		Minute Order from hearing on 08/06/12 set this matter for status regarding filing of the Inventory & Appraisal.	<u>CONTINUED FROM 11/27/12</u> Minute Order from 11/27/12 states: No appearances. Matter continued to 01/04/13. The Court orders Larry Donaldson to be personally present on 01/04/13. If the Inventory & Appraisal is filed by 01/04/13, no appearance will be necessary.
Aff.Sub.Wit.		Clerk's Certificate of Mailing filed 11/30/12 shows that a copy of the minute order dated 11/27/12 was mailed to Larry Donaldson on 11/30/12.	1. Need Inventory & Appraisal.
Verified			
Inventory	x		
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			Reviewed by: JF
Status Rpt			Reviewed on: 12/14/12
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 11 – Roberts

Probate Status Hearing Re: Filing of the Final Inventory and Appraisal

Age: 11 years	MARLEEN C. MAFFEO aka MARLEEN CORONEL was appointed guardian of the estate with bond set at \$335,000.00 on 7/18/12.	NEEDS/PROBLEMS/COMMENTS: 1. Need Final Inventory and Appraisal or current written status report pursuant to Local Rule 7.5.
Cont. from	Bond was filed on 9/12/12.	
Aff.Sub.Wit.	Letters issued 7/18/12.	
Verified		
Inventory	Inventory and Appraisal, partial #1 was filed on 11/16/12 with a value of \$22,493.61.	
PTC		
Not.Cred.		
Notice of Hrg	Notice of Status Hearing was mailed to Joanne Sanoian on 11/16/12.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: KT
Reviewed on: 12/13/12
Updates:
Recommendation:
File 12 - Maffeo

Age: 8 years	MARLEEN C. MAFFEO aka MARLEEN CORONEL was appointed guardian of the estate with bond set at \$335,000.00 on 7/18/12. Bond was filed on 9/12/12. Letters issued 7/18/12. Inventory and Appraisal, partial #1 was filed on 11/16/12 with a value of \$22,493.61. Notice of Status Hearing was mailed to Joanne Sanoian on 11/16/12.	NEEDS/PROBLEMS/COMMENTS: 1. Need Final Inventory and Appraisal or current written status report pursuant to Local Rule 7.5.	
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: KT Reviewed on: 12/13/12 Updates: Recommendation: File 13 – Maffeo			

Status Hearing Re: Filing of the Inventory and Appraisal

		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Inventory and Appraisal filed on 10/24/12.
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: KT
		Reviewed on: 12/13/12
		Updates:
		Recommendation:
		File 14 - Malach

Status Hearing Re: Filing of the Inventory and Appraisal

		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Inventory and Appraisal filed on 11/1/12.
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
		Reviewed by: KT
		Reviewed on: 12/13/12
		Updates:
		Recommendation:
		File 15 - Silva

DOD: 3/5/11 Cont. from <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 10%;">Aff.Sub.Wit.</td><td style="width: 10%;"></td></tr> <tr><td>Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td></td></tr> <tr><td>Aff.Mail</td><td></td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>	Aff.Sub.Wit.		Verified		Inventory		PTC		Not.Cred.		Notice of Hrg		Aff.Mail		Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order		Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice		<p>MINDY CASTILLO, daughter, filed a Petition to Determine Succession requesting Court determination that decedent's 100% interest in real property located at 760 E. Valley Street in Coalinga, 50% interest in real property located at 360 E. Houston Street in Coalinga, 100% interest in a 2005 Chevy pick-up and a 1992 Chevy pick-up and an investment account pass to her pursuant to intestate succession.</p> <p>Carol Ackerman filed objections to the Petition alleging she has filed a Petition under Probate Code §850 (see page 19 of this calendar), seeking to have the court determine that the Decedent was holding title to the real property located at 360 E. Houston in Coalinga as a constructive trustee for the objecting party.</p> <p>Minute Order from the settlement conference dated 11/16/12 states the court is informed that a resolution has been reached in case #12CEPR00631 as fully set forth by Mr. Gin. Parties also agree to dismiss case no. 12CEPR00808 with prejudice upon the entry of the order in this case. Upon inquiry by the Court, each party individually agrees to the terms and conditions of the settlement. Counsel is directed to prepare necessary documents. Matter set for status hearing on 1/4/13, if all the necessary documents are filed by 1/4/13, no appearance will be necessary.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. An Order Determining Succession to the real property located at 760 E. Valley Street has been signed. The issue of the property located at 360 E. Houston was reserved. Petitioner has submitted a proposed order which would pass the decedent's ½ interest in the real property located at 360 E. Houston to Mindy Castillo subject to a life estate in favor of Carol Ackerman. The order further states that upon the death of Carol Ackerman the property shall be sold and the net proceed distributed equally to Mindy Castillo and Sara Lynn Orozco (it is unclear if this is just as to the decedent's ½ interest in the real property or if it is for 100% of the property). This court has no authority make any orders regarding the ½ interest in the property that is not subject to these proceedings. 2. Minute order states that an agreement was reached. Need stipulation signed by all parties to the agreement. <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Reviewed by: KT</td></tr> <tr><td>Reviewed on: 12/13/12</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 17 - Castillo</td></tr> </table>	Reviewed by: KT	Reviewed on: 12/13/12	Updates:	Recommendation:	File 17 - Castillo
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Inventory																																																					
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Recommendation:																																																					
File 17 - Castillo																																																					

Status Hearing Re: Filing of the Receipt of Funds in the Blocked Account

Age: 7		<p>AMY TAYLOR and TOBY TAYLOR, Sister and Brother-in-Law, were appointed Co-Guardians of the Person and Estate on 10-2-12. Letters issued on 10-3-12</p> <p>At hearing on 10-2-12, the Court signed an Order to Deposit Money Into Blocked Account for all proceeds and set this status hearing for the filing of the receipt of funds in the blocked account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 11-16-12</u>: Mr. Roberts is appearing via conference call. Mr. Roberts informs the court that the funds are currently with MetLife and they have placed the funds in their own blocked account. Continued to 1-4-13.</p> <p><u>As of 12-12-12, nothing further has been filed.</u></p> <p>1. Need receipt for blocked account.</p> <p><u>Note</u>: Pursuant to Declaration filed 9-28-12, an account at MetLife containing \$21,201.16 was issued.</p>
Cont. from 111612			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt	X		
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 12-12-12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 18 - Camp</p>	

Status Hearing Re: Settlement Agreement

DOD: 3/5/11		<p>CAROL ACKERMAN filed an Petition under Probate Code §850 alleging the right and title to the real property located at 360 E. Houston Street in Coalinga, CA.</p> <p>Petitioner's claims were based upon the fact that Petitioner, acting under erroneous information, believed that she would lose her Medicare eligibility because she owned property located at 360 E. Houston. As a result of this misinformation, Petitioner executed a deed for the property transferring title to Sara Lynn Orozco and to the decedent.</p> <p>Petitioner alleged had known the truth, that she would have still been eligible for Medicare benefits while retaining title to the property, she never would have transferred the property to Sara Lynn Orozco and the decedent.</p> <p>Minute order from the settlement conference held on 11/16/12 states the court is informed that a resolution has been reached in case no. 12CEPR00631 (page 17 of this calendar) ad fully set forth by Mr. Gin. Parties also agree to dismiss the petition in this case with prejudice upon the entry of the order in case no. 12CEPR00631 (page 17). Upon inquiry by the Court, each party individually agrees to the terms and conditions of the settlement. Counsel is directed to prepare the necessary documents. Matter set for Status Hearing on 1/4/13. If all necessary documents are filed by 1/4/13, no appearance will be necessary.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Please see page 17 of this calendar.</p>				
Cont. from							
<input type="checkbox"/>	Aff.Sub.Wit.						
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<input type="checkbox"/>	Objections						
<input type="checkbox"/>	Video Receipt						
<input type="checkbox"/>	CI Report						
<input type="checkbox"/>	9202						
<input type="checkbox"/>	Order						
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<input type="checkbox"/>	Status Rpt						
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<input type="checkbox"/>	Citation						
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		<table border="1"> <tr> <td>Reviewed by: KT</td> </tr> <tr> <td>Reviewed on: 12/13/12</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 19 – Castillo</td> </tr> </table>	Reviewed by: KT	Reviewed on: 12/13/12	Updates:	Recommendation:	File 19 – Castillo
Reviewed by: KT							
Reviewed on: 12/13/12							
Updates:							
Recommendation:							
File 19 – Castillo							

Atty Shirey, Donald W.

Atty Shirey, Sharon L.

Status Hearing Re: Proof that a Guardianship has been Established or Initiated in Washington

Age:	DONALD and SHARON SHIREY , maternal		NEEDS/PROBLEMS/COMMENTS: 1. Petitioners have initiated the process and filed a "Nonparental Custody Petition" in WA; however, it does not appear that an order on the petition has been signed yet. The Court may require status of the procedure and may continue this hearing to ensure an order is obtained in Washington per Probate Code §2352(d).
DOD:	grandparents, were appointed guardians on 7/2/2009.		
Cont. from			
Aff.Sub.Wit.	Father: ADRIAN RODRIGUEZ – Consented and waived notice.		
Verified	Mother: AMBER SHIREY – Consented and waived notice.		
Inventory	On 8-30-12, the Court granted the Guardians' Petition to Fix Residence Outside the State of California and set this status hearing for proof that a guardianship or equivalent has been established in Washington State.		
PTC	On 12-3-12, Petitioners filed a Pre-Move Notice of Proposed Change of Personal Residence for Ward, along with a Declaration attaching a "Nonparental Custody Petition" filed in Clark County, WA, on 11-19-12.		
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 12-13-12			
Updates:			
Recommendation:			
File 22 - Shirey			